

Job Aid:

Ensuring Document Confidentiality

This Job Aid explains how to:

- Ensure confidential vendor documents submitted with quotes do not display publicly after award.

Of Special Note:

Documents submitted with quotes during the bid process normally become part of the public record after award. At times vendors may submit documents with their quote that contain sensitive information. Examples of these documents are: W9, Standard Contract Form, Commonwealth Terms & Conditions, EFT and Contractor Authorized Signatory Listing. In effect, anything that is not subject to FOIA should not display publicly.

Prior to quote submission vendors should mark these documents as confidential. However at times they may not. It is incumbent on the buyer to review all submitted documents and designate any documents that should be confidential as such, prior to bid award or the creation of the Master Blanket Purchase Order.

Screenshot

Directions



COMMBUYS is the only official procurement record system for the Commonwealth of Massachusetts' Executive Departments. COMMBUYS offers free internet-based access to all public procurement information posted here in order to promote transparency, increase competition, and achieve best value for Massachusetts taxpayers.

COMMBUYS INFORMATION:

For more information on COMMBUYS please visit the [COMMBUYS](#) support pages.

[Training and Registration for Purchasers](#)

[Training and Registration for Sellers](#)

[Job Aids for Purchasers](#)

[Job Aids for Sellers](#)

Information about Statewide Contract Purchasing

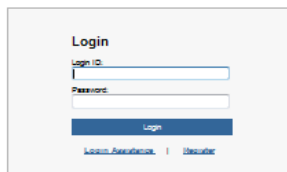
[Statewide Contract Index](#), [Contract User Guides](#) and [Procurement Schedule](#)

UNSPSC Look-Up Tool for Buyers and Vendors

[UNSPSC Look-Up Tool](#)

[UNSPSC Look-Up Tool Instructions](#)

If you have any questions or concerns contact the COMMBUYS Help Desk at COMMBUYS@state.ma.us or ring us during normal business hours (8AM – 5PM Monday – Friday) at 1-888-827-8283 or 617-720-3197.



The screenshot shows a login form with the following elements:

- Header: Login
- Input field: Login ID
- Input field: Password
- Button: Login
- Links: [Forgot Username](#) and [Forgot Password](#)

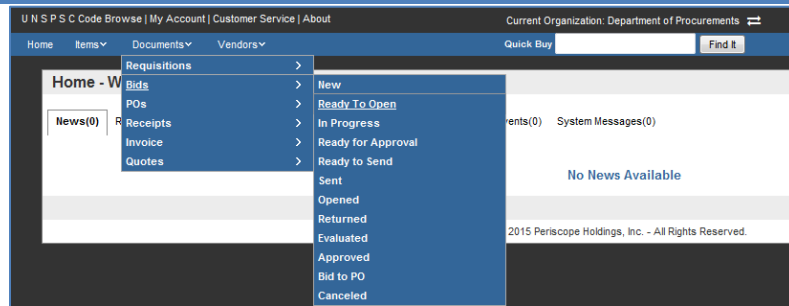
1: Launch the COMMBUYS website by entering the URL for [COMMBUYS](https://www.commbuys.com) (<https://www.commbuys.com>) in the browser.

Enter your Login ID and password and click the **Login** button on the COMMBUYS landing page.

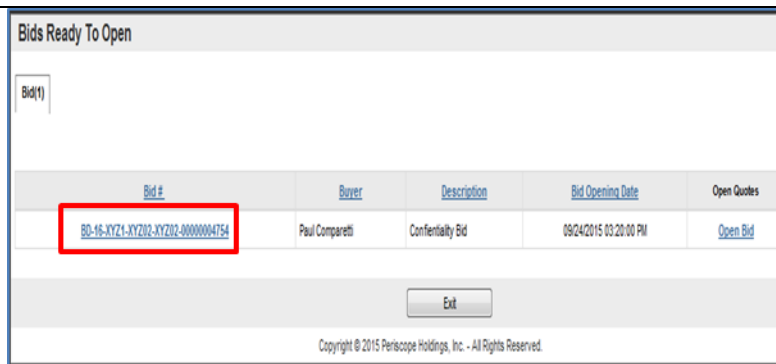
Job Aid: Ensuring Document Confidentiality

Screenshot

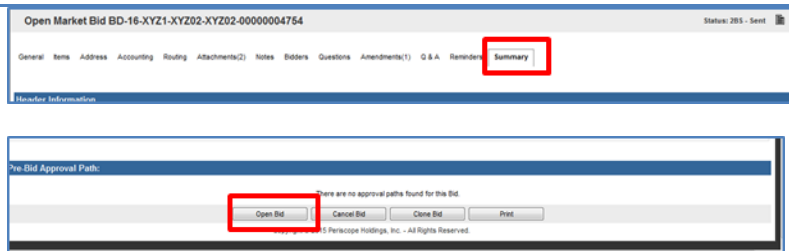
Directions



2: To locate your Bid click on **Documents>Bids>Ready to Open.**



3: Click on the appropriate bid number to open the bid.



4. The bid opens to the **Summary** page.

- Scroll to the bottom of the page and click **Open Bid**.
- Note the bid status will change to **2BO-Opened**.

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Screenshot

Directions

Open Market Bid BD-16-XYZ1-XYZ02-XYZ02-00000004754 Status: 280 - Opened

General Items Address Accounting Routing Attachments(2) Notes Bidders Questions Amendments(1) Q & A Reminders Summary

There are no approval paths found for this Bid.

Bid Tab Cancel Bid Close Bid View Quote History Print

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5. Scroll to the bottom of the page and click the **Bid Tab** button.

Bid Tabulation for Bid #BD-16-XYZ1-XYZ02-XYZ02-00000004754

Quotes Revisions Items Header Questions Subcontractors Routing Attachments Score Summary [Back to Bid](#)

Total Number of Submitted Quotes: 1

Consider All	Quote #	Description	Vendor ID	Vendor Name	Submit Date	View Quote
<input checked="" type="checkbox"/>	QT-XYZ1-XYZ02-XYZ02-00000007673	Confidentially Bid	00015302	Kramerica Industries	09/24/2015 11:19:38 AM	View Quote

[Create New Quote](#) [Save And Continue](#)

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6. The Bid Tabulation page opens to the **Quotes** Tab.

Click on the **Quote Number** or the **View Quote** link to open the vendor quote.

Quote QT-XYZ1-XYZ02-XYZ02-00000007673 - Kramerica Industries

General Items Questions Subcontractors Terms & Conditions **Attachments(4)** Evaluations Preference Reminders Summary

Header Information

Quote #: QT-XYZ1-XYZ02-XYZ02-00000007673 Bid #: BD-16-XYZ1-XYZ02-XYZ02-00000004754 Status:

7. Click on **Attachments**.

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Screenshot

Directions

Files

Name	Description	Confidential
Contractor Authorized Signatory.rtf	Contractor Authorized Signatory	<input checked="" type="checkbox"/>
newmass-w9.docx	W9	<input type="checkbox"/>
RFR_req-specs.docx	RFR Photography	<input type="checkbox"/>
EFT_FORM.pdf	Electronic Funds Transfer Form	<input checked="" type="checkbox"/>

Forms

No Form Attachments

[Save & Continue](#) [Close Window](#)

8. Note the **Name** and the **Confidential** columns.

Any documents marked confidential will not display publically.

In this example the bidder submitted a completed **W9** but did not check the **Confidential** box.

Quote QT-XYZ1-XYZ02-XYZ02-00000007673 - Kramerica

General | Items | Questions | Subcontractors | Terms & Conditions | **Attachments(4)** | Evaluations | Preference | Reminders | Summary

Files

Name	Description	Confidential
Contractor Authorized Signatory.rtf	Contractor Authorized Signatory	<input checked="" type="checkbox"/>
newmass-w9.docx	W9	<input checked="" type="checkbox"/>
RFR_req-specs.docx	RFR Photography	<input type="checkbox"/>
EFT_FORM.pdf	Electronic Funds Transfer Form	<input checked="" type="checkbox"/>

Forms

No Form Attachments

[Save & Continue](#) [Close Window](#)

9. Check the **Confidential** box next to the W9 then **Save & Continue**.

The bid may now be awarded. Confidential documents will not display publically.

Important Note: If for some reason a confidential document is not marked as such at this time, the buyer has another opportunity to mark the document confidential. This must be during the creation of the Master Blanket Purchase Order. Proceed to Step 10

Bid Tabulation for Bid #BD-16-XYZ1-XYZ02-XYZ02-00000004754

[Quotes](#) | [Revisions](#) | [Items](#) | [Header Questions](#) | [Subcontractors](#) | [Routing](#) | [Attachments](#) | [Score](#) | **Summary** | [Back to Bid](#)

Confirmation Messages

- Changes saved successfully.

Bid Tabulation Information

Total Item Count: 1 Total Awarded Quote Count: 1 Bid Status: 2BA - Bid Approved (Ready for Vendor Awarding)

10. After award, click the **Create PO** button

[Create PO](#) [Print](#)

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Bid BD-16-XYZ1-XYZ02-XYZ02-00000004754 - Purchase Order Creation Preview

1 purchase order will be created for the following quote:

Quote #	Vendor ID	Vendor Name
QT-XYZ1-XYZ02-XYZ02-00000007673	00014302	Kram

Purchase order creation options:

- ☒ Include Narrative Items
- ☒ Include Bid Attachments
- ☒ Include Bid Tab Attachments
- ☒ Include Bid Notes
- ☒ Include Quote Subcontractors
- ☒ Include Vendor Quote Attachments
- ☒ Include Forms

Click 'Continue' button to create PO or click 'Cancel & Exit' button to cancel the PO creation and return to the bid tabulation summary page.

Continue **Cancel & Exit**

11. The Purchase Order Creation Preview displays.

Leave all options checked. Click **Continue**.

Critical Notes:

- If any options are unchecked they will not display in the PO but you will lose the ability to mark the document confidential. They will display publically in the quote.
- If you do not want certain documents included in the MBPO do not uncheck them here. Delete the documents from the MBPO attachment tab.

Open Market Bid BD-16-XYZ1-XYZ02-XYZ02-00000004754 - Purchase Order(s) Created

The following Purchase Order(s) were created:

PO #	Vendor ID	Vendor Name	Total
PO-16-XYZ1-XYZ02-XYZ02-00000004831	00014302	KramERICA Industries	\$0

OK

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12. The PO has been created. Click on the **PO#** link to open the PO.

Open Market Purchase Order PO-16-XYZ1-XYZ02-XYZ02-00000004831

General **Items** **Vendor** **Address** **Accounting** **Routin** **Attachments(6)** **Notes** **Change Orders** **Reminders** **Summary**

Header Information

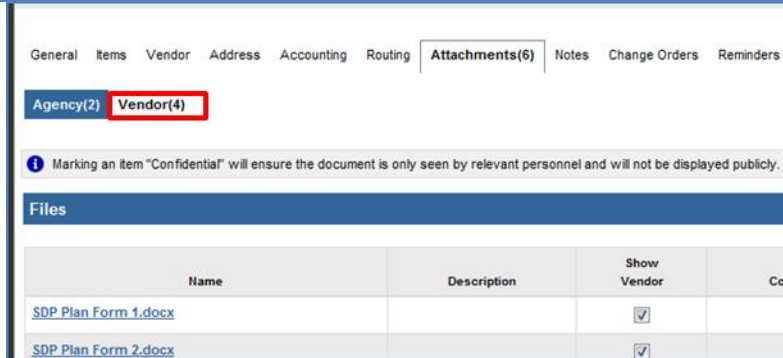
Purchase Order Number:	PO-16-XYZ1-XYZ02-XYZ02-00000004831	Release Number:
Status:	3PI - In Progress	Purchaser:
Fiscal Year:	2016	PO Type:
Organization:	Department of Procurements	Location:
Department:	XYZ02 - Procurement	Entered Date:
Alternate ID:		Retainage %:
Days ARO:	0	

13. From the PO Screen click on **Attachments**.

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Screenshot

Directions



General Items Vendor Address Accounting Routing **Attachments(6)** Notes Change Orders Reminders

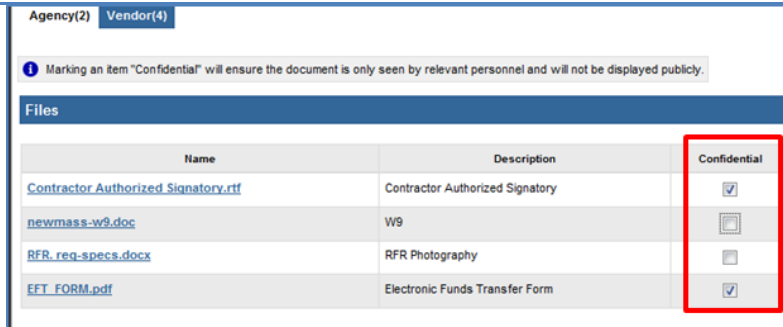
Agency(2) **Vendor(4)**

Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

Files

Name	Description	Show Vendor	Confidential
SDP Plan Form 1.docx		<input checked="" type="checkbox"/>	
SDP Plan Form 2.docx		<input checked="" type="checkbox"/>	

14. Click on the **Vendor** sub-tab to view Vendor Quote attachments.



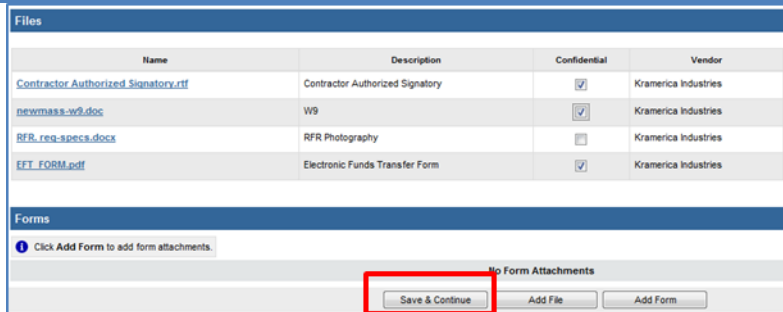
Agency(2) **Vendor(4)**

Marking an item "Confidential" will ensure the document is only seen by relevant personnel and will not be displayed publicly.

Files

Name	Description	Confidential	Vendor
Contractor Authorized Signatory.rtf	Contractor Authorized Signatory	<input checked="" type="checkbox"/>	
newmass-w9.doc	W9	<input type="checkbox"/>	
RFR_req-specs.docx	RFR Photography	<input type="checkbox"/>	
EFT_FORM.pdf	Electronic Funds Transfer Form	<input checked="" type="checkbox"/>	

15. Review all documents and mark confidential as required.



Files

Name	Description	Confidential	Vendor
Contractor Authorized Signatory.rtf	Contractor Authorized Signatory	<input checked="" type="checkbox"/>	Kramerica Industries
newmass-w9.doc	W9	<input checked="" type="checkbox"/>	Kramerica Industries
RFR_req-specs.docx	RFR Photography	<input type="checkbox"/>	Kramerica Industries
EFT_FORM.pdf	Electronic Funds Transfer Form	<input checked="" type="checkbox"/>	Kramerica Industries

Forms

Click Add Form to add form attachments.

No Form Attachments

Save & Continue Add File Add Form

16. Save & Continue.